

Short-Cut to Running SFEX With Dates

This guide provides “the basics” on how to run SFEX with dates for the W-2 program.

Basic Definitions

W-2 Participation Period: 16th of one month to 15th of next month.

W-2 Eligibility Month: Is the month that is the second half of a participation period.
Example: 7/16 – 8/15. The Eligibility Month is August. An eligibility month date is always the 1st of that month (080104).

W-2 Payment Month: Is the month following the Eligibility month.
Example: 7/16 – 8/15. Eligibility Month is August (080104). Payment month is September.

Running with Dates: Adding a specific eligibility month date after the case number.
You run eligibility (SFEX) with dates in order to have CARES re-determine a prior eligibility month decision.

Super-simplified Rules of Thumb

- 👉 If the placement change is in the 1st half of the month, run with that month's date.
- 👉 If the placement change is in the 2nd half of the month, run with the following month's date.
- 👉 The only time you ever need run with the exact placement change date is if an initial placement is made between the 16th and the end of the month and you make a change to that placement before the end of that same month. (Example: placed in W2T on 7/21 then changed to CMC on 7/25. Run with 07/25/04, then 080104, then without dates.)

Key Points

1. Base running SFEX with dates on the new placement date/closure date posted on ACWI.
2. Always run with dates, then without dates.*
3. Only confirm the W-2 benefit when running with dates.

* **Please Note:** There is one exception to this. If you are adding a person to the case and at the same time making a change on ACWI, SFEX is automatically run. When this happens:

- A. Run without dates first and confirm the W-2 benefit only.
- B. Re-run with dates for the current month and confirm the W-2 benefit only.

If not done in this order, payments will not be correct. The most common scenario for this is adding a baby to the case and changing the placement from CMP to CMC.

Steps:

1. Make the change on ACWI.
2. Determine what eligibility month is effected.
3. Run SFEX with that eligibility month date.
4. Verify payment calculation is correct.
5. Confirm only W-2 on AGECE.
6. Run SFEX without dates.
7. Verify payment (if any) is correct.
8. Have all benefits confirmed.
9. If more than one eligibility month is effected (due to backdating a placement), run SFEX with the oldest eligibility month first, then go forward to the next month, then run without a date.
10. Remember the exception above if the change on ACWI is happening at the same time a person is being added to the case.

Examples

Lashanda is in a CMP placement and reports on 7/12/04 that she had her baby on 7/10/04. The FEP changes the placement to CMC effective 7/10. The FEP runs the following sequence for SFEX:

1. NEXT TRAN: SFEX PARMS: case number/070104* (See notes above)

The FEP verifies the calculated payment is \$134 and confirms W-2 on AGECE.

2. NEXT TRAN: SFEX PARMS: case number

The FEP verifies the calculated payment is \$673 and has all benefits confirmed.

Tenisha is in a W2-T. At her EP review on 10/22/04, the FEP determines that a move to CSJ is appropriate. The FEP runs the following sequence for SFEX:

1. NEXT TRAN: SFEX PARMS: case number/110104

The FEP verifies the calculated payment is \$673 and confirms W-2 on AGECE.

2. NEXT TRAN: SFEX PARMS: case number

The FEP verifies the calculated payment is \$673 and has all benefits confirmed.

Darnell is in a CSJ and reports on 8/21 he started full-time employment on 8/13/04. He agrees to CMF services. The FEP backdates the CMF to 8/13/04 and runs the following sequence for SFEX:

1. NEXT TRAN: SFEX PARMS: case number/080104

The FEP verifies the calculated payment is \$608 and confirms W-2 on AGECE.
The FEP runs with August eligibility because that is the first eligibility month affected by the placement change.

2. NEXT TRAN: SFEX PARMS: case number/090104

The FEP verifies the calculated payment is \$0 and has all benefits confirmed.

3. NEXT TRAN: SFEX PARMS: case number

The FEP verifies the calculated payment is \$0 and has all benefits confirmed.